



# USDA Weekly Retail Turkey Feature Activity

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 10/10 thru 10/16.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

Fri. Oct 10, 2014

## NATIONAL SUMMARY

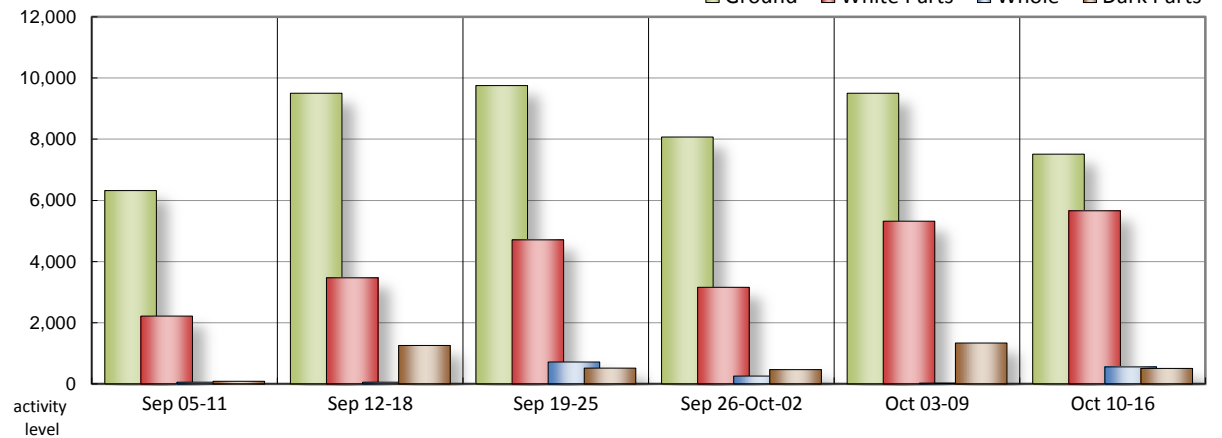
	THIS WEEK		LAST WEEK		LAST YEAR	
<b>Feature Rate</b> <sup>1/</sup>	<b>43.0% of 22,900 outlets</b>		<b>50.5% of 22,900 outlets</b>		<b>N/A</b>	
<b>Special Rate</b> <sup>4/</sup>	<b>5.5%</b>		<b>1.3%</b>		<b>N/A</b>	
<b>Activity Index</b> <sup>2/</sup>	<b>15,700</b>		<b>18,150</b>		<b>N/A</b>	
<b>3/</b>	<b>Stores</b>	<b>Wtd Avg</b>	<b>Stores</b>	<b>Wtd Avg</b>	<b>Stores</b>	<b>Wtd Avg</b>
<b>WHOLE BIRDS:</b>						
Fresh - Hens			10	1.49	N/A	N/A
" - Toms					N/A	N/A
Frozen - Hens	280	1.19	10	1.29	N/A	N/A
" - Toms	280	1.19	10	1.29	N/A	N/A
<b>PARTS:</b>						
<b>Breast:</b>						
Bone-in, whole					N/A	N/A
Fresh			10	2.99	N/A	N/A
Frozen	2,490	1.59	3,090	1.54	N/A	N/A
Split, bone-in					N/A	N/A
Fresh	20	3.49	10	2.99	N/A	N/A
Rotisserie	1,650	9.47	820	8.16	N/A	N/A
Boneless, whole	140	4.99	230	4.80	N/A	N/A
Cutlets	410	5.11	880	4.93	N/A	N/A
Cutlets, thin sliced	140	4.99	40	4.99	N/A	N/A
Strips					N/A	N/A
Tenders	30	5.32	70	3.89	N/A	N/A
Marinated Tenders	780	4.28	170	3.94	N/A	N/A
Drumsticks	180	1.83	240	2.67	N/A	N/A
Thighs	20	2.58	100	2.99	N/A	N/A
Wings	140	1.89	300	2.73	N/A	N/A
Necks	30	1.99	20	1.79	N/A	N/A
Smoked Drumsticks	40	2.14	280	2.49	N/A	N/A
Smoked Wings	50	2.23	230	2.54	N/A	N/A
Smoked Necks	50	2.23	170	2.40	N/A	N/A
<b>GROUND TURKEY:</b>						
	<b>7,510</b>	<b>3.87</b>	<b>9,500</b>	<b>3.56</b>	<b>N/A</b>	<b>N/A</b>
Patties	940	3.98	500	3.76	N/A	N/A
Sausage	890	3.50	400	3.25	N/A	N/A
85% lean	530	2.85	3,380	2.91	N/A	N/A
93% lean	2,440	3.29	2,680	3.29	N/A	N/A
Breast	2,710	4.82	2,540	4.86	N/A	N/A
Rolls (frsh/frz 1 lb.)	90	2.55	130	2.77	N/A	N/A
<b>Specialty</b> <sup>5/</sup>						
Patties					N/A	N/A
93-94% lean	540	4.52	410	4.81	N/A	N/A
Breast	830	6.00	1,420	6.47	N/A	N/A

Note: rolls & specialty not included in ground turkey total and weighted average.

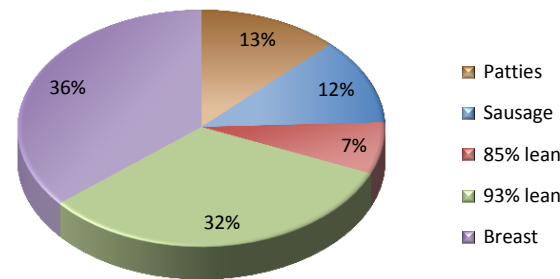
## This Week's Turkey Feature Highlights

Retail feature activity slows on turkey items, increases on deli items. Offerings increase on frozen hens and toms; stores are starting to roll out promotions for free or reduced price turkeys for Thanksgiving. Fewer stores are promoting frozen bone-in breasts, but shoppers will have few problems finding sale priced bone-in breasts. Offerings increase on rotisserie breasts but they will cost more this week. Ads for boneless white parts focus on marinated tenders; prices are higher on most white parts. Feature activity declines on dark parts; fresh drums and wings are the most frequently promoted dark part. Featuring slows on ground turkey. The weighted average price is higher due to ground breast being the most actively featured grind. Offerings decline on specialty ground turkey. Deli featuring increases on service deli and self-service deli items. Service deli offerings are most active on thin slicing meats; prices are mostly lower on service deli items. Retailers increase offerings on self-service deli private brands, decrease offerings on processor brands.

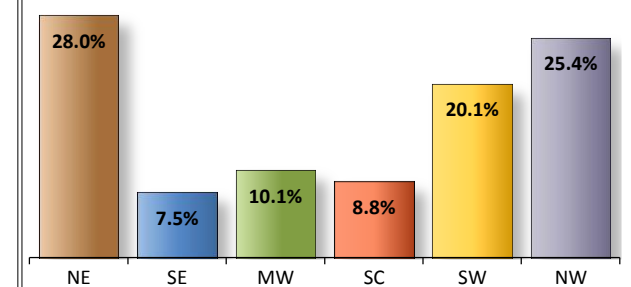
## Turkey Promotional Activity by Category



## Ground Turkey Featuring by Type



## Relative Feature Activity by Region



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

**1/ Feature Rate:** the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. **2/ Activity Index:** a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). **3/ Stores/Avg:** the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. **4/ Special Rate:** the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.). **5/ Specialty:** products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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Fri. Oct 10, 2014

	NORTHEAST U.S. (CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			SOUTHEAST U.S. (AL,FL,GA,MS,NC,SC,TN,VA,WV)			MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)		
<b>Special Rate</b> <sup>4/</sup>	57.9% of 4,700 sampled outlets			39.2% of 5,900 sampled outlets			36.1% of 4,200 sampled outlets		
<b>Activity Index</b> <sup>2/</sup>	6.4% of stores w/ no-price promotions			12.6% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
	Activity Index = 5,820			Activity Index = 2,130			Activity Index = 1,900		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens									
" - Toms									
Frozen - Hens	1.19	220	1.19	0.99	10	0.99	1.29	10	1.29
" - Toms	1.19	220	1.19	0.99	10	0.99	1.29	10	1.29
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh									
Frozen	0.98 - 1.97	270	1.41	1.49 - 1.97	1,170	1.65	0.97 - 1.99	610	1.48
Split, bone-in									
Fresh							3.49	20	3.49
Rotisserie	6.99 - 9.99	210	8.16	9.99	40	9.99	7.99 - 9.99	30	8.51
Boneless, whole	4.99	140	4.99						
Cutlets	4.99 - 6.35	320	5.14	5.99	20	5.99			
Cutlets, thin sliced	4.99	140	4.99						
Strips									
Tenders									
Marinated Tenders	3.73 - 4.99	580	4.43	3.73	120	3.73	3.99 - 4.39	80	4.06
Drumsticks	1.49 - 1.99	150	1.74				1.59 - 2.99	30	2.27
Thighs							1.99 - 2.99	20	2.58
Wings	1.79 - 2.39	120	1.93				1.59 - 1.69	20	1.65
Necks	1.99	30	1.99						
Smoked Drumsticks	2.29	20	2.29	1.99	20	1.99			
Smoked Wings	2.29	20	2.29	1.99 - 2.69	30	2.19			
Smoked Necks	2.29	20	2.29	1.99 - 2.69	30	2.19			
<b>GROUND TURKEY:</b>									
Patties	3.49 - 4.59	530	3.85	3.39	10	3.39	2.49 - 3.99	210	3.84
Sausage	3.19 - 4.39	690	3.55	3.19 - 3.99	110	3.39	2.69 - 3.27	40	3.01
85% lean	3.33 - 3.49	30	3.41	2.39 - 3.00	150	2.53	1.99 - 3.29	200	2.92
93% lean	2.68 - 4.59	1,160	3.11	3.07 - 3.50	110	3.32	2.99 - 3.69	470	3.36
Breast (99-100% lean)	4.61 - 6.15	530	4.81	4.61 - 4.99	270	4.63	4.79	10	4.79
Rolls (frsh/frz 1 lb.)				2.99	30	2.99	1.00 - 2.99	10	2.28
<b>Specialty</b> <sup>5/</sup>									
Patties									
93-94% lean	2.99 - 5.99	410	4.39				3.99 - 4.99	130	4.92
Breast	6.99	10	6.99						



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Fri. Oct 10, 2014

	SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
Feature Rate <sup>1/</sup>	34.2% of 4,200 sampled outlets			50.4% of 2,800 sampled outlets			40.4% of 1,200 sampled outlets		
Special Rate <sup>4/</sup>	5.2% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index <sup>2/</sup>	Activity Index = 1,660			Activity Index = 2,750			Activity Index = 1,440		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>WHOLE BIRDS:</b>									
Fresh - Hens									
" - Toms									
Frozen - Hens	0.99 - 1.69	40	1.18						
" - Toms	0.99 - 1.69	40	1.18						
<b>PARTS:</b>									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.59 - 1.69	150	1.68	1.49 - 1.69	290	1.68			
Split, bone-in									
Fresh									
Rotisserie	7.49 - 9.99	390	9.71	6.99 - 9.99	380	9.14	9.99	600	9.99
Boneless, whole									
Cutlets	4.59 - 4.99	70	4.73						
Cutlets, thin sliced									
Strips									
Tenders	4.99	20	4.99	5.99	10	5.99			
Marinated Tenders									
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
<b>GROUND TURKEY:</b>									
Patties	3.99	40	3.99	3.99 - 4.99	150	4.71			
Sausage	3.19	10	3.19	3.99	10	3.99	3.27 - 3.52	30	3.36
85% lean	2.91	10	2.91	2.99	140	2.99			
93% lean	2.91 - 3.99	280	3.55	3.19 - 4.23	360	3.53	3.19 - 3.99	60	3.49
Breast (99-100% lean)	4.60 - 4.79	340	4.67	4.49 - 6.23	1,130	4.95	4.47 - 4.79	430	4.71
Rolls (frsh/frz 1 lb.)	1.88 - 2.79	50	2.34						
<b>Specialty <sup>5/</sup></b>									
Patties									
93-94% lean									
Breast	5.99	220	5.99	5.99	280	5.99	5.99	320	5.99



# USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 10/10 thru 10/16.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

Fri. Oct 10, 2014

	NATIONAL SUMMARY						NORTHEAST U.S.			SOUTHEAST U.S.		
	This Week		Last Week		Last Year		(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)		
Feature Rate <sup>1/</sup>	77.0% of 22,900 stores		69.7% of 22,900 stores		N/A		88.9% of 4,700 sampled outlets			83.2% of 5,900 sampled outlets		
Activity Index 2/	52,180		50,200		N/A		Activity Index = 14,900			Activity Index = 11,930		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	3,940	7.85	3,770	8.31	N/A	N/A	6.48 - 10.99	1,420	8.27	6.99 - 9.99	1,370	7.24
Private Brand	2,160	7.91	2,000	7.81	N/A	N/A	6.47 - 9.99	1,950	7.85			
<b>Category 2</b>												
Processor Brand	5,960	6.12	3,400	6.36	N/A	N/A	4.98 - 6.99	2,040	6.25	4.99 - 6.99	460	5.66
Private Brand	3,840	6.22	6,560	7.19	N/A	N/A	5.99 - 7.49	360	6.57	4.99 - 6.99	1,880	5.72
<b>Category 3</b>												
Processor Brand	790	4.08	980	4.43	N/A	N/A	3.99 - 4.99	530	4.16	3.99	120	3.99
Private Brand	50	4.88	200	5.00	N/A	N/A	4.98	40	4.98			
<b>Turkey Ham</b>												
Processor Brand	480	3.94	190	4.16	N/A	N/A	2.99 - 4.49	270	3.83	4.59	100	4.59
Private Brand					N/A	N/A						
<b>Turkey Pastrami</b>												
Processor Brand	310	4.70	370	4.94	N/A	N/A	2.99 - 8.99	140	4.60			
Private Brand					N/A	N/A						
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	1,690	7.56	6,350	7.80	N/A	N/A	6.98 - 8.99	620	7.79	8.49	210	8.49
Private Brand	6,120	7.09	940	7.03	N/A	N/A	2.99 - 7.99	1,920	5.45	6.99 - 7.99	690	7.18
<b>Category 2</b>												
Processor Brand	180	5.10	440	5.46	N/A	N/A	4.98 - 4.99	120	4.99			
Private Brand	360	6.25	220	5.98	N/A	N/A				5.99	50	5.99
<b>SELF-SERVICE DELI</b>												
(dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	10,000	3.47	11,730	3.43	N/A	N/A	2.50 - 4.00	1,680	3.44	2.00 - 4.00	2,500	3.50
Private Brand	2,420	2.98	620	3.04	N/A	N/A	2.79 - 3.00	1,040	2.97	2.79 - 3.50	370	2.99
<b>Turkey 16 oz</b>												
Processor Brand	1,900	5.14	1,300	5.29	N/A	N/A	3.99 - 5.99	120	4.93	4.99 - 5.00	1,320	4.99
Private Brand	10	4.99			N/A	N/A	4.99	10	4.99			
<b>Chicken 7-10 oz</b>												
Processor Brand	9,890	3.47	10,510	3.53	N/A	N/A	2.50 - 4.00	1,660	3.46	2.00 - 4.00	2,490	3.50
Private Brand	2,080	2.97	620	3.04	N/A	N/A	2.79 - 3.00	980	2.97	2.79 - 3.50	370	2.99

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



# USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

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(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)			SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
Feature Rate <sup>1/</sup>	73.2% of 4,200 sampled outlets			67.7% of 4,200 sampled outlets			64.5% of 2,800 sampled outlets			73.9% of 1,200 sampled outlets		
Activity Index 2/	Activity Index = 9,460			Activity Index = 7,930			Activity Index = 3,680			Activity Index = 4,280		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
<b>SERVICE DELI - Turkey</b>												
<b>Category 1</b>												
Processor Brand	6.99 - 9.99	430 7.76		6.99 - 11.49	600 8.34		6.99 - 8.99	100 7.29		6.99 - 12.99	20 10.54	
Private Brand	7.99 - 10.99	160 8.89		5.49 - 8.49	50 6.99							
<b>Category 2</b>												
Processor Brand	4.98 - 6.99	1,310 6.35		5.89 - 5.99	1,140 5.80		3.99 - 6.99	540 6.31		5.98 - 5.99	470 5.99	
Private Brand	4.99 - 6.99	880 6.09		6.99 - 8.49	530 7.38		8.49	40 8.49		7.49 - 8.49	150 7.59	
<b>Category 3</b>												
Processor Brand	3.49 - 3.99	70 3.87		3.49 - 4.49	20 3.99		3.77	50 3.77				
Private Brand	4.49	10 4.49										
<b>Turkey Ham</b>												
Processor Brand	3.49	10 3.49		2.59 - 5.49	50 3.32		3.49 - 3.99	50 3.90				
Private Brand												
<b>Turkey Pastrami</b>												
Processor Brand	3.98 - 4.29	100 4.23		5.49 - 6.88	20 6.51					4.59 - 7.99	50 5.21	
Private Brand												
<b>SERVICE DELI - Chicken</b>												
<b>Category 1</b>												
Processor Brand	5.98 - 8.99	490 7.15		6.99 - 7.99	120 7.10		5.99 - 8.49	180 6.16		9.99	70 9.99	
Private Brand	7.99	180 7.99		6.99 - 7.99	980 7.94		7.99	540 7.99		7.99	1,810 7.99	
<b>Category 2</b>												
Processor Brand	3.69 - 5.79	60 5.33										
Private Brand	5.99	200 5.99		4.99 - 6.99	110 6.84							
<b>SELF-SERVICE DELI</b>												
(dollars per tub or pouch)												
<b>Turkey 7-10 oz</b>												
Processor Brand	2.00 - 3.99	2,090 3.27		2.39 - 2.50	2,000 3.41		2.49 - 3.99	950 3.63		3.49 - 3.99	780 3.88	
Private Brand	2.68 - 3.00	540 2.97		3.00	280 3.00		3.00	130 3.00		3.00	60 3.00	
<b>Turkey 16 oz</b>												
Processor Brand	3.99 - 5.99	320 5.83		3.99 - 5.99	120 5.13		4.99	20 4.99				
Private Brand												
<b>Chicken 7-10 oz</b>												
Processor Brand	2.00 - 3.99	2,070 3.28		2.39 - 2.58	1,910 3.41		2.49 - 3.99	950 3.63		3.49 - 3.99	810 3.87	
Private Brand	2.68 - 3.00	540 2.97					3.00	130 3.00		3.00	60 3.00	

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)

Source: USDA Agricultural Marketing Service, Livestock, Poultry & Seed Market News - (515) 284-4460 <http://www.ams.usda.gov/LPSMarketNewsPage>